COVID Locating Health Provider Portal

Training for IIS Level Reporting

[1. Introduction]

Welcome to a demonstration of the COVID Locating Health Provider Portal for Jurisdictions reporting COVID-19 vaccine inventory on behalf of all the providers in their location. In this demo we will explain how to set up your account and report inventory through the portal using a flat file upload. We will also walk through how to add and remove vaccines from your inventory list.

VaccineFinder will serve two roles in the COVID response. The COVID Locating Health Platform will enable providers to report on-hand inventory daily.

And in a later phase, when vaccine supply is more widely available this portal will collect data to populate a public search site vaccinefinder.org for the public to locate a vaccine provider near them. These fields will be optional for those providers who wish to be shown.

This training will focus on how to use the COVID Locating Health Provider Portal to report on-hand inventory supply each day.

A few important things to note before we get started.
1.   Please use Google Chrome, Safari, or Edge web browser to view the COVID Locating Health website
2.   Please note that after 1 hour of inactivity you will need to fresh the page and log in again to update through the portal
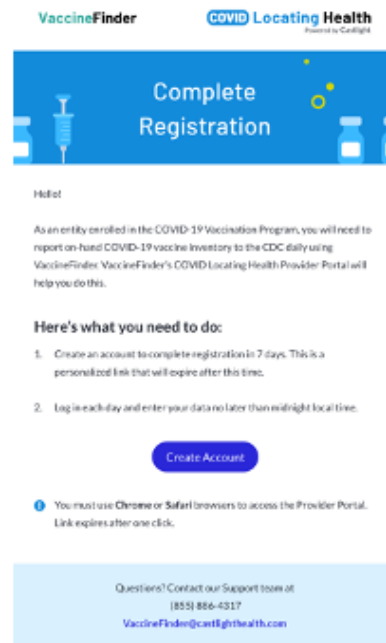
Jurisdictions must complete two steps prior to seeing their locations appear in VaccineFinder. These

steps are:

1. Submit the locations in their Provider Enrollment file.
2. Register the locations in VTrckS as a COVID-19 vaccination provider and set the Special Project Provider flag to 2 for COVID-19 in the ExIS file.

Let's get started.

2. Register on the COVID Locating Health Platform]

- The period of time for Jurisdictions to register to report at the IIS level has closed. If you did not opt in to report at the IIS level your providers will be reporting inventory independently through the COVID Locating Health Provider Portal. For more information on the provider experience see the training on provider-level reporting.
- Please note that jurisdictions that have elected to report at the IIS level will need to maintain this reporting method for the duration of the COVID-19 vaccination program.
- In order to be registered as the designated reporter for COVID-19 Vaccine Inventory for your jurisdiction with the CDC, you must provide a primary and secondary point of contact.
- Once you have submitted your contacts to the CDC, each contact will receive a unique email inviting them to complete their registration.
- The registration email will be sent from the following address: **vaccinefinder@auth.castlighthealth.com**
- This registration email contains a single click link that will allow you to set your password credentials for the COVID Location Health Provider Portal. The link must be opened in Safari, Edge, or Google Chrome and will expire after 7 days.
- If your link has expired, you may contact our helpdesk at **vaccinefinder@castlighthealth.com** for assistance in getting a new link.
- Users must click *Create Account* to complete registration.

[3. Set Your Password]

● Once the user clicks on *Create Account,* they will be brought to the account creation page
● The page will pre-populate with the user's username, which is the same as the email address the registration link was sent to.
● On this page the user will be asked to choose a password
● The password must meet the following criteria for creation:
  ○ Use upper and lower case letters (e.g. Aa)
  ○ Use 8 or more characters
  ○ Use a number (e.g. 1234)
  ○ Use a symbol (e.g. !@#?)
  ○ No guessable password (e.g. Password123!)
  ○ No password containing part of username
  ○ No password containing first name
  ○ No password containing last name
● The user will be asked to confirm the password. The password typed in the confirmation box must match the original password.
● Once the user has chosen a password they will click *Create Account* to finalize their account creation.
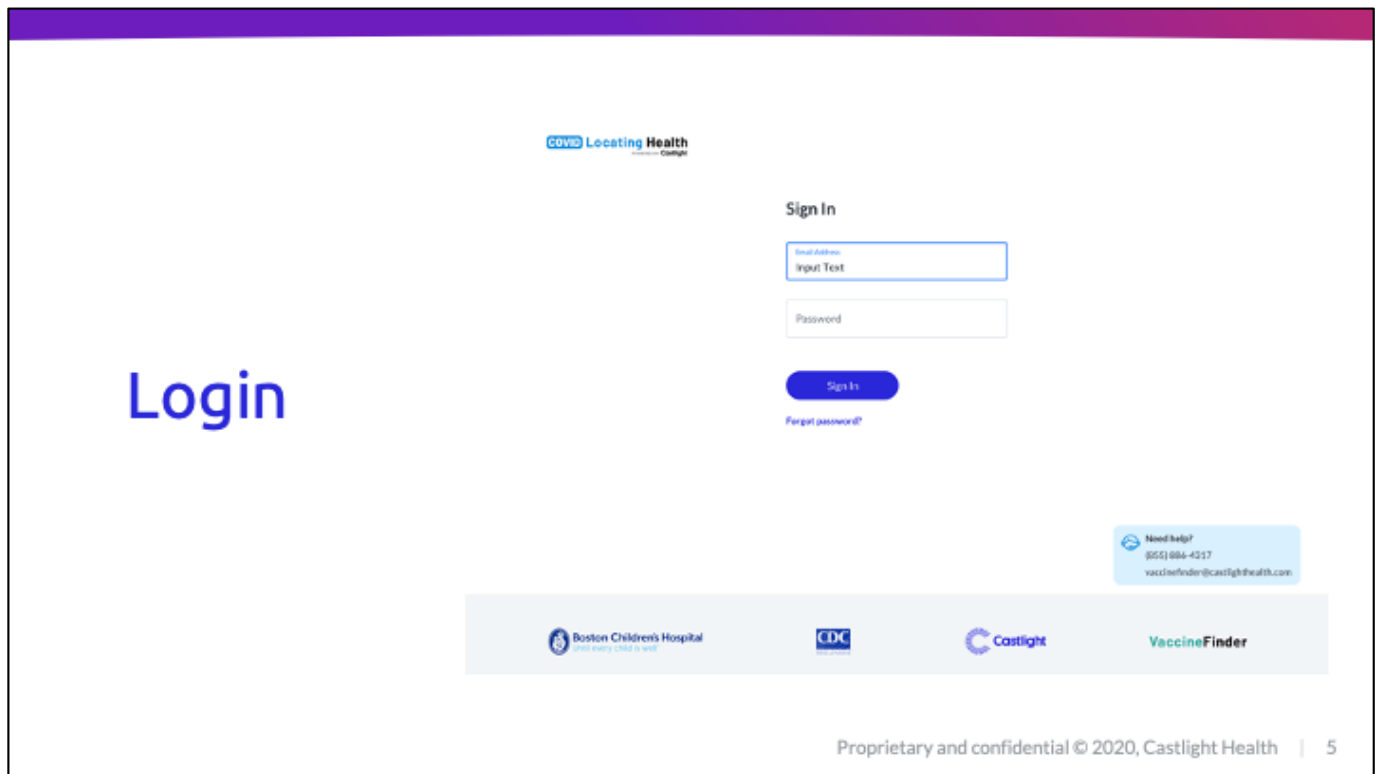
[4. Login]
- Once a user has completed registration they will be brought out to the COVID Location Health Provider Portal login screen.
- This is the page users can visit daily to log into their account.
- This screen also allows for the user to initiate the forgot password flow and trigger an email to reset their password.

Tip: bookmark https://covid.locating.health for future visits!
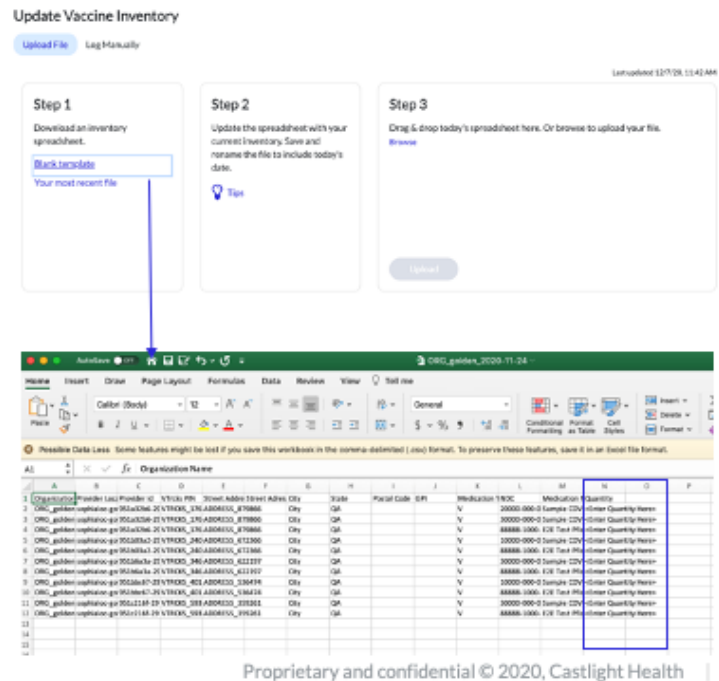
File Upload: Overview

Update Vaccine Inventory

Upload File   Log Manually

Last updated 12/7/20, 11:42 AM

Step 1
Download an inventory spreadsheet.
Blank template
Your most recent file

Step 2
Update the spreadsheet with your current inventory. Save and rename the file to include today's date.
Tips

Step 3
Drag & drop today's spreadsheet here. Or browse to upload your file.
Browse

Upload

[7a. File Upload: Overview]
- The file upload screen is how jurisdictions will report inventory for all locations in their jurisdiction.
- The file upload process allows for editing quantity on hand in bulk through a flat file upload.
  - From this view you can:
    - Download a template file
    - Download your most recent inventory
    - Upload your daily inventory
    - Add/Remove vaccine
- Jurisdictions reporting at the IIS may also choose to generate a file externally to upload into VaccineFinder. We will review the file requirements for that file in this training as well.

[7b: File Upload: Step 1- Download File]

Step 1: Blank template
- To begin updating inventory through the bulk file screen, the user will first select the *Blank Template* button from the box labeled Step 1. In subsequent uploads the user may also select to download the most recent inventory. More on that in the following screen.
- This template will be pre-populated with identifying information for all locations listed in VaccineFinder for the user.
- The template will also pre-populate with any vaccines selected during the provider set-up or added through the log manually screen.
- Each line of the template corresponds to an NDC for a single vaccine at a location. This means that if a location is administering two COVID-19 vaccines (for example: Moderna and Pfizer), that location will have two rows in the file, one for each NDC.
- The template will always show the 11 digit NDC unit of use for the vaccine. If you wish to generate your own file for upload we will cover acceptable NDC inputs in a later section of this training.
- The template will have <Enter Quantity Here> in the quantity column to prompt the user to update the quantity on-hand. Quantity must always be entered as the number of doses on-hand at the location.
- The template will automatically update with any new locations that may be added to the user's organization throughout the COVID-19 vaccination program.

[7c: File Upload: Step 1- Download File]

Step 1: Your most recent file
- After a user has uploaded inventory once through the portal, that information will be captured in the database and can be seen by selecting the "Your most recent file" option in step 1 of the upload file screen
- This will download a .csv that is the same as the blank template file, with the exception of the quantity field. Instead of <Enter Quantity Here> the column Quantity will be pre-populated with the last reported inventory for that NDC for each site.
- This file can also be used to upload new quantity data on hand each day; users can simply update the quantity column with the current number of doses on hand

[7d. File Upload: Step 2 - Log Inventory]

[7d. File Upload: Step 2 - Log Inventory]

- Step 2 is to update inventory for all locations
- To report inventory daily, the user simply needs to update the quantity field with the doses on hand for each vaccine listed for the provider locations.
    - The user can enter the number of doses in the corresponding row for that NDC.
    - If the user does not know the quantity on-hand for a particular NDC at a location, they may also enter UNKNOWN in the quantity field.
- The user may also skip the row if there is no inventory to report.
- Once the user has updated the quantity field, the user must save the file with the changes made.

Tip: Saving the file with the current date will help identify the correct file for upload.

Tip : Saving the file to the same location each day, like the desktop or a specific folder on the hard drive will also help to locate the correct file for upload.

[7d. File Upload: Step 2 - Log Inventory]
- Step 2 is to update inventory for all locations
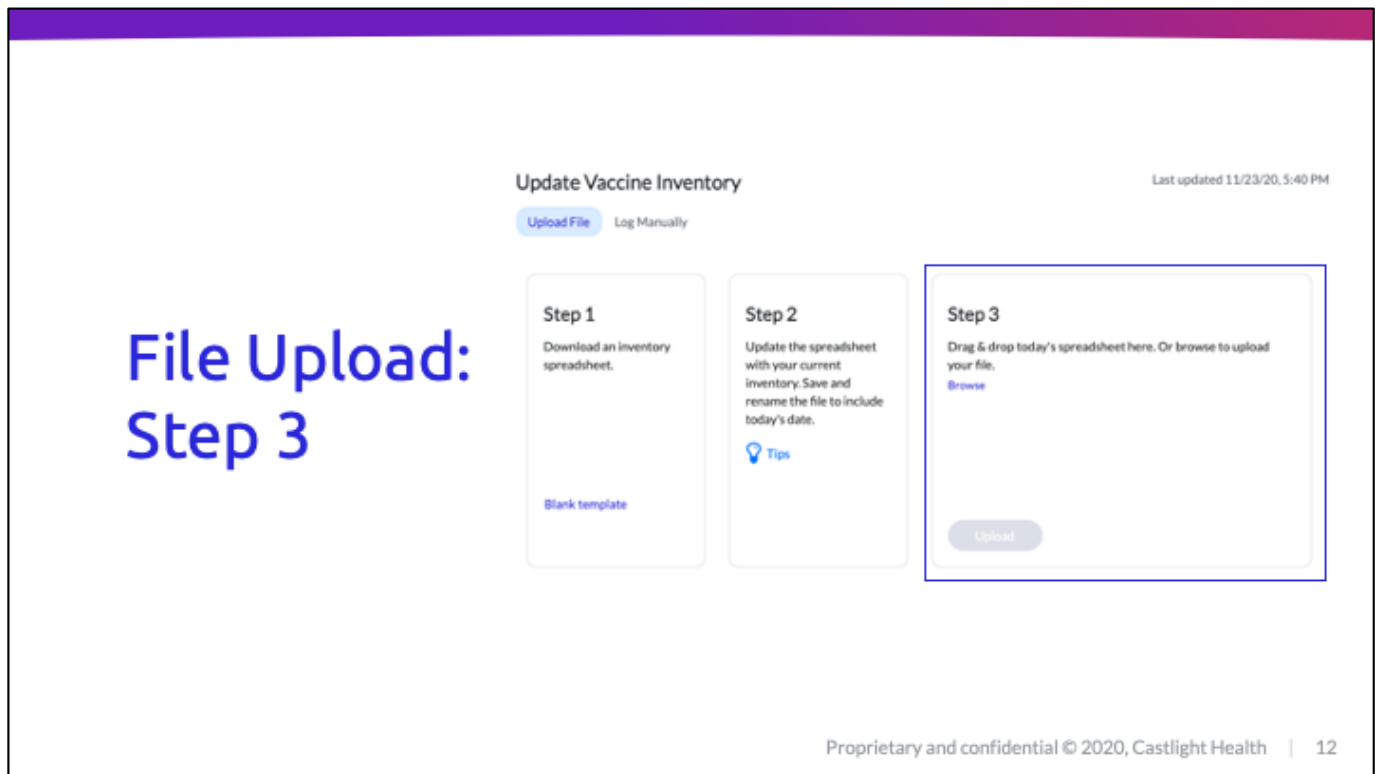- To report inventory daily, the user simply needs to update the quantity field with the doses on hand for each vaccine listed for the provider locations.
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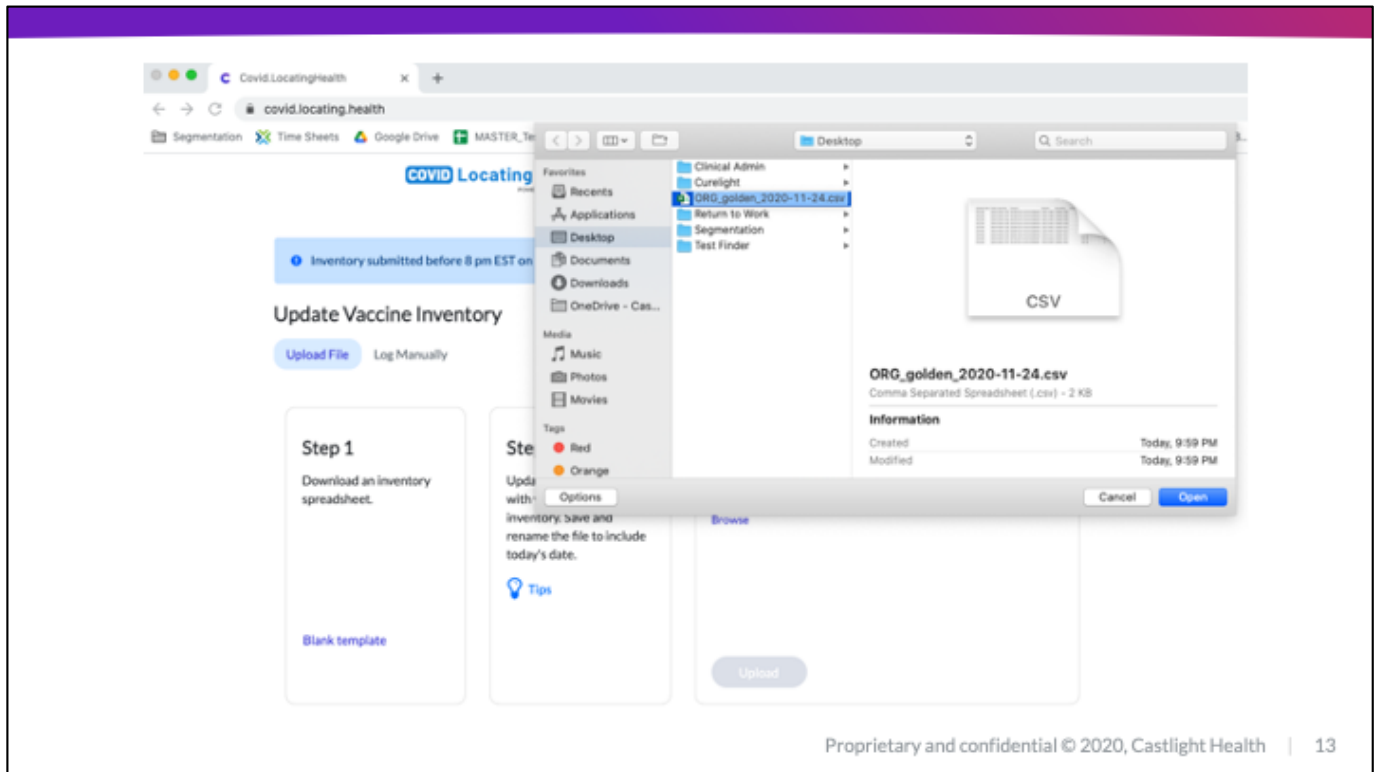- Once the user has updated the quantity field, the user must save the file with the changes made.

Tip: Saving the file with the current date will help identify the correct file for upload.

Tip : Saving the file to the same location each day, like the desktop or a specific folder on the hard drive will also help to locate the correct file for upload.

[7e. File Upload: Step 3 – Upload File]

- Once the user has saved the current inventory, they are ready to upload the file.
- To upload the file, the user must click Browse in the box labeled Step 3.
- The user will then select the file they wish to upload.
- If the user selects the wrong file, they may clear that file out by selecting the small X on the file.
- Once the user has selected the file, they must select the Upload button to process the file.
- The file will be processed and validated as it is uploaded into the Vaccine Finder system.
- If the upload is successful, the user will see the green success screen.
- If there is an error the user will be shown an error screen. The error screen will report the row(s) where an error appeared in the file and a brief description of the error. The user will then be prompted to try again.
- A user is allowed to upload as many files per day as they need by selecting the *Browse Again* button. The latest inventory reported at 5AM EST will be sent to the CDC.
- A user will be able to download the updated inventory as well as see how many records were updated due to the most recent upload.

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Update Vaccine Inventory

Upload File   Log Manually

Step 1

Download an inventory spreadsheet.

Blank template

Step 2

Update the spreadsheet with your current inventory. Save and rename the file to include today's date.

💡 Tips

Step 3

Drag & drop today's spreadsheet here. Or browse to upload your file.

Browse

ORG_golden_2020-11-24.csv ⊗

Upload

[7e. File Upload: Step 3 – Upload File]

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- A user will be able to download the updated inventory as well as see how many records were updated due to the most recent upload.

Update Vaccine Inventory

Upload File   Log Manually

Last updated 12/7/20, 11:59 AM

Step 1

Download an inventory spreadsheet.

Blank template

Your most recent file

Step 2

Update the spreadsheet with your current inventory. Save and rename the file to include today's date.

💡 Tips

Success! ✅

Uploaded File
vaccine-inventory_2020-12-07.csv
View updated file
10 records updated

Your most recent inventory file will be reported to VaccineFinder at 5am Eastern daily. Files uploaded after that time will be reported the following day.

Want to upload a new file? Browse again

[7e. File Upload: Step 3 – Upload File]
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- To upload the file, the user must click Browse in the box labeled Step 3.
- The user will then select the file they wish to upload.
- If the user selects the wrong file, they may clear that file out by selecting the small X on the file.
- Once the user has selected the file, they must select the Upload button to process the file.
- The file will be processed and validated as it is uploaded into the Vaccine Finder system.
- If the upload is successful, the user will see the green success screen.
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- A user is allowed to upload as many files per day as they need by selecting the *Browse Again* button. The latest inventory reported at 5AM EST will be sent to the CDC.
- A user will be able to download the updated inventory as well as see how many records were updated due to the most recent upload.

File Upload: Externally Generated File Format

Step 3

Drag & drop today's spreadsheet here. Or browse to upload your file.

Browse

Upload

[7f. File Upload: IIS Generated File Requirements]

VaccineFinder also allows for jurisdictions to generate a file directly from their IIS for upload into VaccineFInder.

The file must be in .csv format and have all the column headers that appear in the template file downloadable through the provider portal

Although all the headers are required data only needs to be populated for the required fields. We will get to more information on those fields a little later on.

While there is not naming convention required for the file we do recommend including the date in the file name. It will make selecting the correct file for upload easier.

Inventory should only be reported for those locations that have receives supply and are listed in the provider enrollment file and have the special COVID flag in VTrckS.

If a file contains a VTrckS PIN that is not listed in VaccineFinder, the file will fail to upload.

[7f. File Upload: IIS Generated File Requirements]

VaccineFinder also allows for jurisdictions to generate a file directly from their IIS for upload into VaccineFInder.

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Inventory should only be reported for those locations that have receives supply and are listed in the provider enrollment file and have the special COVID flag in VTrckS.

If a file contains a VTrckS PIN that is not listed in VaccineFinder, the file will fail to upload.

IIS Generated File Requirements

Required fields and accepted values:

- **VTrckS PIN**
  - This must be the 9-digit formatted VTrckS PIN including the jurisdiction prefix and the padding spaces
- **NDC**
  - Only include one NDC per vaccine type in your file
  - You can report in using either the 11 or 10 digit unit of use or unit of sale, with or without "-"
  - The provider portal will always convert this to the 11 digit unit of use once the file is uploaded
- **Quantity**
  - Regardless of the NDC you use, quantity must always be reported as the **number of doses** on-hand

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Organization Name	Provider Location Name	Provider Id	VTrcks PIN	Street Address	Street Adress 2	City	State	Postal Code	GPI	Medication Type	NDC	Medication Name	Quantity
optional	optional	optional	required	optional	optional	optional	optional	optional	optional	optional	required	optional	required

[7f. File Upload: IIS Generated File Requirements]

There are three required fields that must be populated for the file to upload. If any required fields are blank, the file will fail to upload.

The required fields are:
- VTrckS PIN
  - This must be the 9-digit formatted VTrckS PIN including the jurisdiction prefix and the padding spaces
- NDC
  - Only include one NDC per vaccine type in your file
  - You can report in using either the 11 or 10 digit unit of use or unit of sale, with or without "-"
  - The provider portal will always convert this to the 11 digit unit of use once the file is uploaded
- Quantity
  - Regardless of the NDC you use, quantity must always be reported as the number of doses on-hand

[7g. File Upload: Add/Remove Vaccine]
- A user may also add or remove vaccine through the file upload.
  - To remove a vaccine simply type REMOVE into the quantity field for that row.
  - To add a vaccine, the user must create a new row in the template and copy over all the location information. The user can then type in the new NDC, enter a quantity and save the file.
- All changes will be saved upon upload and will be present in any subsequent template downloads.

Step 2

Update the spreadsheet with your current inventory. Save and rename the file to include today's date.

💡 Tips

If the doses on hand are unknown, enter UNKNOWN in the quantity field. If you wish to indicate that you no longer stock a vaccine or added one in error, add REMOVE in the quantity field.

[7g. File Upload: Add/Remove Vaccine]
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  - To remove a vaccine simply type REMOVE into the quantity field for that row.
  - To add a vaccine, the user must create a new row in the template and copy over all the location information. The user can then type in the new NDC, enter a quantity and save the file.
- All changes will be saved upon upload and will be present in any subsequent template downloads.

To remove a vaccine: enter REMOVE in the *Quantity* field to remove a vaccine from a location.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Organization	Provider Loca	Provider Id	VTrcks PIN	Street Addre	Street Adres	City	State	Postal Code	GPI	Medication T	NDC	Medication M	Quantity
2	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	20000-000-0	Sample COV	REMOVE
3														

To add a vaccine: copy the location information into a new row, add the new NDC and enter a quantity.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Organization	Provider Loca	Provider Id	VTrcks PIN	Street Addre	Street Adres	City	State	Postal Code	GPI	Medication T	NDC	Medication M	Quantity
2	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	20000-000-0	Sample COV	REMOVE
3	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	20000-000-0	Sample COV	REMOVE
4														
5														

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Organization	Provider Loca	Provider Id	VTrcks PIN	Street Addre	Street Adres	City	State	Postal Code	GPI	Medication T	NDC	Medication M	Quantity
2	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	20000-000-0	Sample COV	REMOVE
3	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	30000-000-0	Sample COV	100

Changes will be reflected in the template the next time you download it.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Organization	Provider Loca	Provider Id	VTrcks PIN	Street Addre	Street Adres	City	State	Postal Code	GPI	Medication T	NDC	Medication M	Quantity	
2	ORG_golden	sophialoc-go	951a32b6-25	VTRCKS_176	ADDRESS_879866		City	QA			V	30000-000-0	Sample COV	<Enter Quantity Here>	
3															

[7g. File Upload: Add/Remove Vaccine]
- A user may also add or remove vaccine through the file upload.
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- All changes will be saved upon upload and will be present in any subsequent template downloads.

[7h. File Upload: Error Messaging]
- If there is an error in the file, the user will be shown an error screen. The error screen will report the row(s) where an error appeared in the file and a brief description of the error. The user will then be prompted to try again.
- Common errors that appear when updating inventory through the template include unsupported values for the quantity field. Acceptable values are:
  - \<Enter Quantity Here\>
  - 0 or any positive integer
  - Remove
  - Unknown
- Errors will populate for files generated externally as well, common errors for these files may include, missing headers or required fields, VTrckS PINs that are not found in the VaccineFinder database, and any inventory reported for non-COVID NDCs
- If a user continues to have issues with uploading the file, they may reach out to our help desk through the information provided on the upload file screen.

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- If a user continues to have issues with uploading the file, they may reach out to our help desk through the information provided on the upload file screen.

Thank you

Additional Tips and Resources:

1. If you need to change your point of contact, have issues accessing your account, or uploading a file please reach out to our helpdesk at vaccinefinder@castlighthealth.com
2. For additional training materials, including data import documentation and VaccineFinder factsheets visit https://vaccinefinder.org/covid-provider-resources

Thank you for your time!

[8. Conclusion]
Thank you for your time during the presentation.

If you have any technical issues or would like to update your points of contact please reach out to **vaccinefinder@castlighthealth.com** for assistance.

There are additional resources available for VaccineFinder including factsheets and data import documentation that can be found on the VaccineFinder.org website. Please visit **https://vaccinefinder.org/covid-provider-resources** for more information.